



Filing ID #10024684

FINANCIAL DISCLOSURE REPORT

Clerk of the House of Representatives • Legislative Resource Center • 135 Cannon Building • Washington, DC 20515

FILER INFORMATION

Name: Mr. Alonzo Marcus Poteet III
Status: Congressional Candidate
State/District: TX21

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2018
Filing Date: 09/12/2018

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Alonzo & Miriam Poteet ⇒ Business Property [RP] LOCATION: Johnson City, TX, US		\$100,001 - \$250,000	Rent	None	None
Alonzo & Miriam Poteet ⇒ Lone Star Capital Bank Savings Account [BA]		\$1,001 - \$15,000	Interest	None	\$1 - \$200
Alonzo & Miriam Poteet ⇒ Thrivent Variable Universal Life [WU]		\$50,001 - \$100,000	Interest	None	None
Alonzo & Miriam Poteet ⇒ U.S.Savings Bonds [GS]		\$1,001 - \$15,000	Tax-Deferred		
Alonzo & Miriam Poteet ⇒ USAA Universal Life [WU]		\$50,001 - \$100,000	None		
Poteet & Associates, Inc ⇒ Poteet & Associates, Inc [OL] LOCATION: Johnson City/Blanco, TX, US DESCRIPTION: sales		\$1,001 - \$15,000	sales	\$1,001 - \$2,500	\$5,001 - \$15,000

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Poteet & Associates, Inc ⇒ SEP IRA - USAA [IH]		\$15,001 - \$50,000	Interest	None	None
Poteet Family Trust ⇒ Bank of America Checking Account [OT]		\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
DESCRIPTION: Bank of America Checking Account					
Poteet Family Trust ⇒ Bank of America Savings Account [OT]		\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
DESCRIPTION: Bank of America Savings Account					
Poteet Family Trust ⇒ Lone Star Capital Bank Checking Account [BA]		\$1,001 - \$15,000	Interest	None	\$1 - \$200
Poteet Family Trust ⇒ Raymond James Financial, Inc. (RJF) [ST]		\$1,001 - \$15,000	Interest	None	None
Poteet Family Trust ⇒ USAA Savings Account [BA]		\$100,001 - \$250,000	Interest	\$1 - \$200	\$1 - \$200
ROTH IRA ⇒ Raymond James Financial, Inc. (RJF) [ST]		\$1,001 - \$15,000	Interest	None	None

* Asset class details available at the bottom of this form. For the complete list of asset type abbreviations, please visit <https://fd.house.gov/reference/asset-type-codes.aspx>.

SCHEDULE C: EARNED INCOME

None disclosed.

SCHEDULE D: LIABILITIES

None disclosed.

SCHEDULE E: POSITIONS

Position	Name of Organization
Owner/President	Poteet & Associates, Inc.

SCHEDULE F: AGREEMENTS

None disclosed.

SCHEDULE J: COMPENSATION IN EXCESS OF \$5,000 PAID BY ONE SOURCE

None disclosed.

SCHEDULE A ASSET CLASS DETAILS

- Alonzo & Miriam Poteet
LOCATION: US
- Poteet & Associates, Inc
LOCATION: US
- Poteet Family Trust
- ROTH IRA

EXCLUSIONS OF SPOUSE, DEPENDENT, OR TRUST INFORMATION

Trusts: Details regarding "Qualified Blind Trusts" approved by the Committee on Ethics and certain other "excepted trusts" need not be disclosed. Have you excluded from this report details of such a trust benefiting you, your spouse, or dependent child?

☐ Yes ☒ No

Exemption: Have you excluded from this report any other assets, "unearned" income, transactions, or liabilities of a spouse or dependent child because they meet all three tests for exemption?

☐ Yes ☒ No

CERTIFICATION AND SIGNATURE

☒ I CERTIFY that the statements I have made on the attached Financial Disclosure Report are true, complete, and correct to the best of my knowledge and belief.

Digitally Signed: Mr. Alonzo Marcus Poteet III, 09/12/2018